
Summary Report
Mobile Learning Survey

19 September 2012

Larmer Brown Consulting Ltd.
8 Murrell Green Business Park, London Road, Hook, Hampshire RG27 9GR
t: +44 (0) 1252 607220 | www.larmerbrown.com

Mobile Learning Survey

Summary

Ofcom statistics quote 91% of the UK population is now using mobile telephones and 34% of those with mobile phones use them to access the internet. Gartner has predicted that by 2013 80 per cent of businesses will support a workforce using tablets, and by 2014 almost all businesses will supply corporate data through smart-phone applications. So, does this mean that organisations are now considering utilizing mobile technology across all aspects of their business, including learning and development?

Only 10 years ago the challenge for those deploying training via eLearning was PC and internet technologies, with screen resolution and broadband speed being two of the biggest hurdles. As users sought a more flexible work/life balance laptops were introduced. Laptops in turn brought their own complexities in terms of remote connection and security. As each of these barriers has been overcome, end users have benefited from the means to work anywhere; working from home or on the train has become the norm. Mobile Devices are now the latest 'must have'. Organisations are seeking to maximise the business benefits and harness the enthusiasm of the user. The benefits of eLearning for the remote or mobile workforce are undeniable in terms of time and budget.

With software vendors recognising the demand for all types of learning - IT Systems, Soft Skills and Compliance being just a few – we consider time is now right to consider Mobile Learning. Unfortunately, the expectation that the features and functions available on our laptop will somehow automatically be delivered to our mobile device is a misconception.

This report outlines the findings of a Mobile Learning Survey undertaken by Larmer Brown to establish the perception of Mobile Learning amongst organisations in the United Kingdom. It looks at the perceived benefits of Mobile Learning as well as the potential barriers to implementation and explores when organisations might be in a position to implement a solution. Data was gathered from a cross section of organisations across the UK between July and September 2012. A total of 155 respondents were questioned, each in a Training and Development position or representing this role within the business.

Analysis of Questions

Larmer Brown regularly canvasses existing Clients as to their short term learning requirements and future objective or strategy. Via this exercise we identified interest, although initially it was gradual, in what we identified as 'Mobile Learning'. Prior to considering a Mobile Learning Client Event to meet what we saw as a growing interest, we decided to conduct Market Research. This research was performed by our own Marketing Team, via the telephone and online forms. In order to keep the results as sterile as possible, we decided to approach a cross-section of the contacts on our database, as a result some of the participants had used Larmer Brown but many were not aware of our Services. The following is a summary of the responses we received.

Do you have a Mobile Workforce?

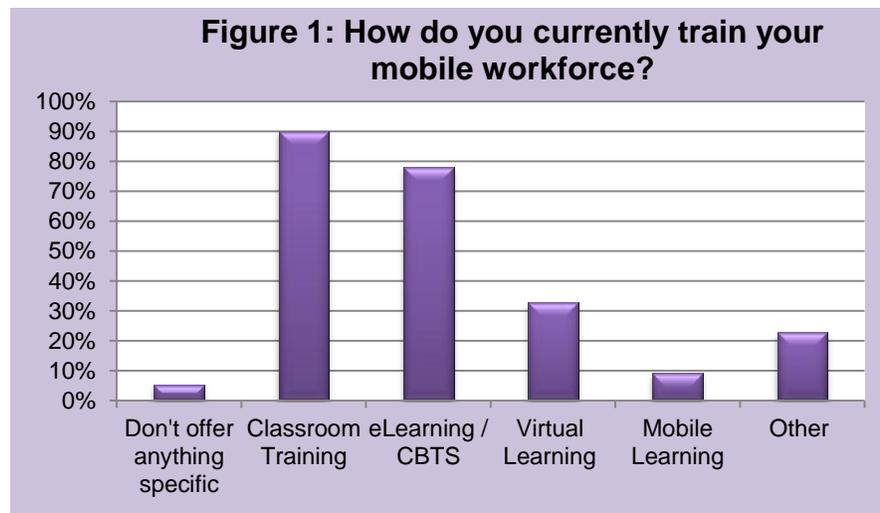
85.2% of organisations questioned have employees working away from the office; what we later refer to in this report as a 'mobile workforce'.

Training a Mobile Workforce

Respondents that confirmed they have employees working away from the office were asked if any specific training is provided for this mobile workforce. Respondents were able to provide multiple answers.

Figure 1 shows that, although these organisations have the challenge of delivering learning to a workforce that is not office based by far the most common form of training delivery is the classroom, with eLearning coming in second place. Our research did not ask why organisations have this preference, although, as this was a multiple choice question we feel we can deduce that the classroom training is being delivered in combination with other methods.

- Only 5.3% don't offer anything specific
- 9.2% provide Mobile Learning
- 90.1% provide Classroom Training
- 77.9% provide eLearning, i.e. computer based training
- 32.8% provide training virtually, for example using a web conferencing service such as WebEx



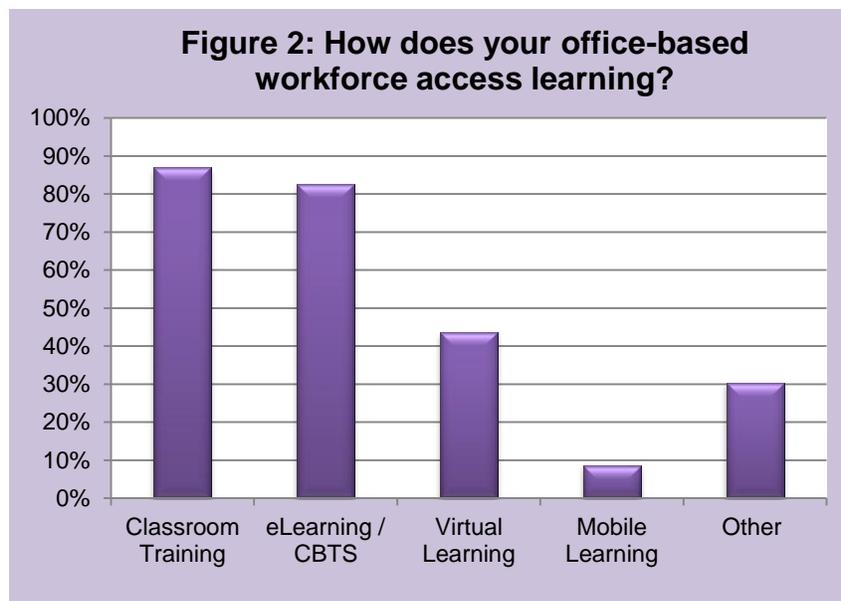
Additional answers for this question included face to face training, external training on day release via an educational facility, on the job training or coaching, and distance learning by providing materials to learner's homes.

Training an Office-Based Workforce

This question was asked of those organisations that do not have what they would consider to be a mobile workforce and therefore do not need to consider delivering training to employees that are not based in the office. Respondents were able to provide multiple answers.

As you can see from Figure 2, classroom training still remains the most common response. However, for organisations training only office-based staff, eLearning is a much closer comparison than those training a mobile workforce.

- 87% deliver Classroom Training
- 82.6% deliver eLearning
- 43.5% deliver training virtually
- 8.7% provide Mobile Learning, only slightly lower than those respondents catering to the training needs of a mobile workforce



Additional answers included face to face training, coaching and sourcing training material via the internet or other media.

Is the time right to consider Mobile Learning?

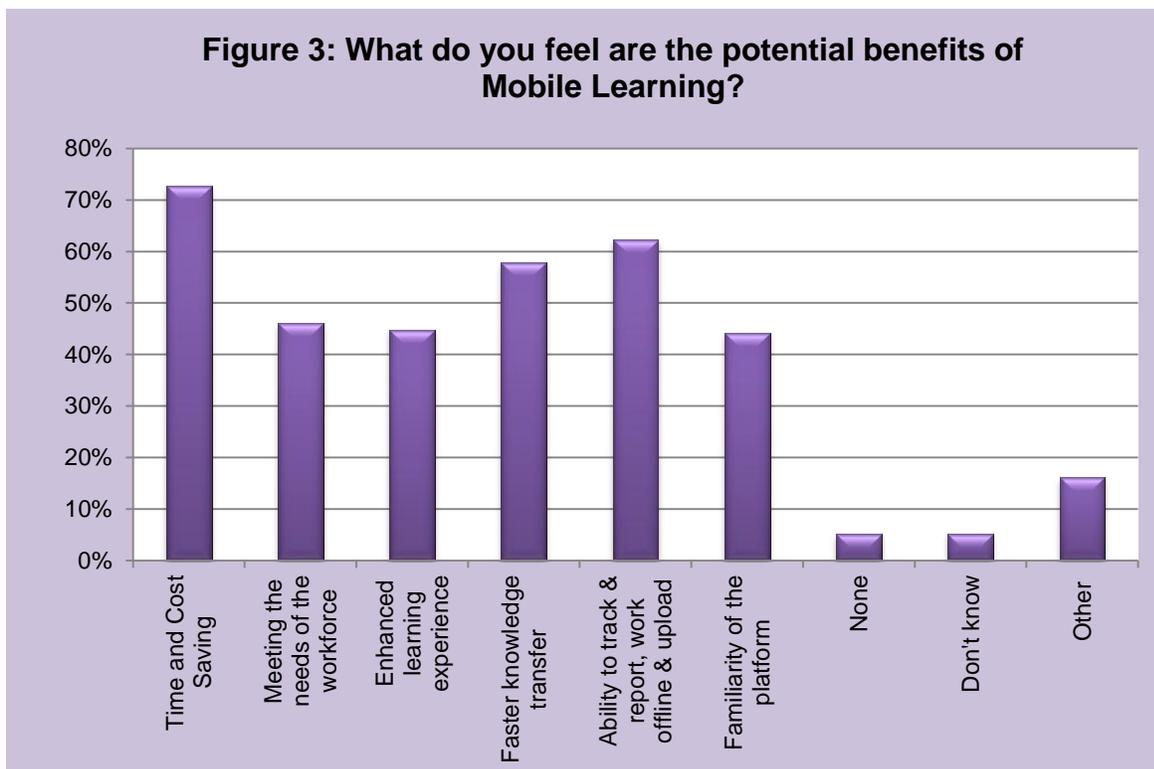
This was positioned with respondents by providing statistics from Ofcom stating that 91% of the UK population use mobile telephones and 34% use their mobile phones to access the internet.

There was almost an equal division with 55.2% of respondents feeling that it is not the right time to consider Mobile Learning, and 44.8% responding positively. Later in this report we discuss the perceived barriers to implementing Mobile Learning, which could help us to understand why there is a low level of positive responses to this question.

Perceived Benefits of Mobile Learning

This question was posed to all respondents regardless of how they had answered the previous question. Respondents were able to provide multiple answers.

Given the responses to earlier questions around training delivery it is not surprising, as can be seen in Figure 3, that time and cost saving is the most popular perceived benefit of Mobile Learning. In an IBM white paper entitled The Value of Training it was estimated that as much as 40% of public classroom training costs are spent on travel and lodging. To determine the real cost of classroom training versus an e-learning solution, the cost of Tuition, Employee travel, Lodging, Vendor costs, Instructor expenses, Administration and any room rental must also be considered. Lost opportunity is of course a real cost. For example, if an employee must spend eight hours travelling to a training class, the employee salary is just one expense: sales and business losses from downtime should also be evaluated.



- Time and Cost Saving was the most popular with 72.7% of respondents providing this answer
- 57.8% quoted faster knowledge transfer
- 44.2% gave familiarity of the platform and the same percentage stated enhanced learning experience
- 44.2% stated enhanced learning experience
- 62.3% stated the ability to track and report, working offline and uploading to server later as a key benefit
- 46.1% said meeting the needs of the entire workforce, which would seem to be a key consideration if an organisation does have a mix of office based and remote workers
- 5.2% could not think of any benefits to Mobile Learning, or stated that there were no benefits

Additional benefits quoted by respondents included flexibility and environmental impact, in terms of reduction in travel as well as utilities costs for classroom training. Other respondents could see particular benefit in delivering regulatory and compliance training. As you will see later in this report, this type of learning seems to be most commonly used in trials of Mobile Learning, including Anti-Bribery and Corruption, Health and Safety, Information Governance, etc.

What do you see as most important in Mobile Learning?

Respondents were then asked to provide just one answer to what they perceived was the most important benefit to Mobile Learning.

- 24.7% felt that Time and Cost Saving was the most important
- 20.8% saw faster knowledge transfer as most important
- 15.6% felt meeting the needs of the entire workforce as the most important benefit
- 9.7% gave the ability to track and report, working offline and uploading to server later as most important benefit
- 9.7% also saw enhanced learning experience as most important.

Discussions following receipt of the one answer provided an interesting insight into the responses:

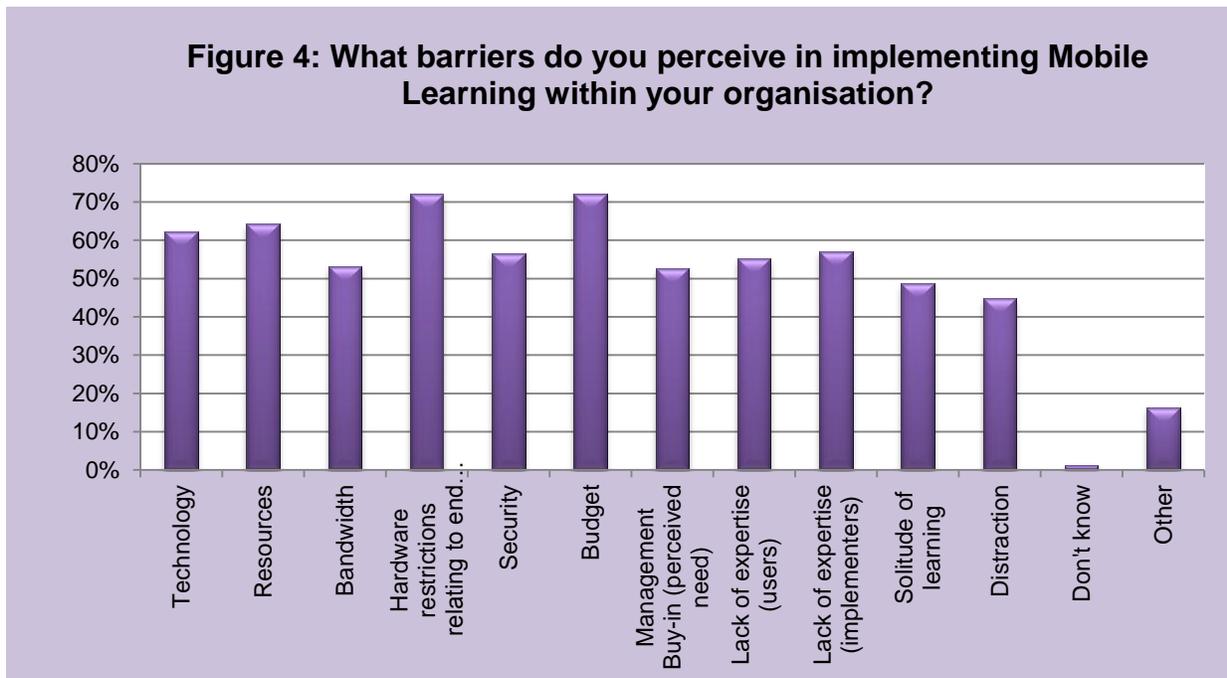
Time and Cost – this feedback was a definite reflection on the economic climate whilst acknowledging the need to improve productivity.

Knowledge Transfer – the ability to re-cover eLearning content was considered a real benefit, especially for tasks not regularly performed.

Tracking and Report offline – a requirement of compliance and governance is the ability to track and report.

Barriers to Implementing Mobile Learning

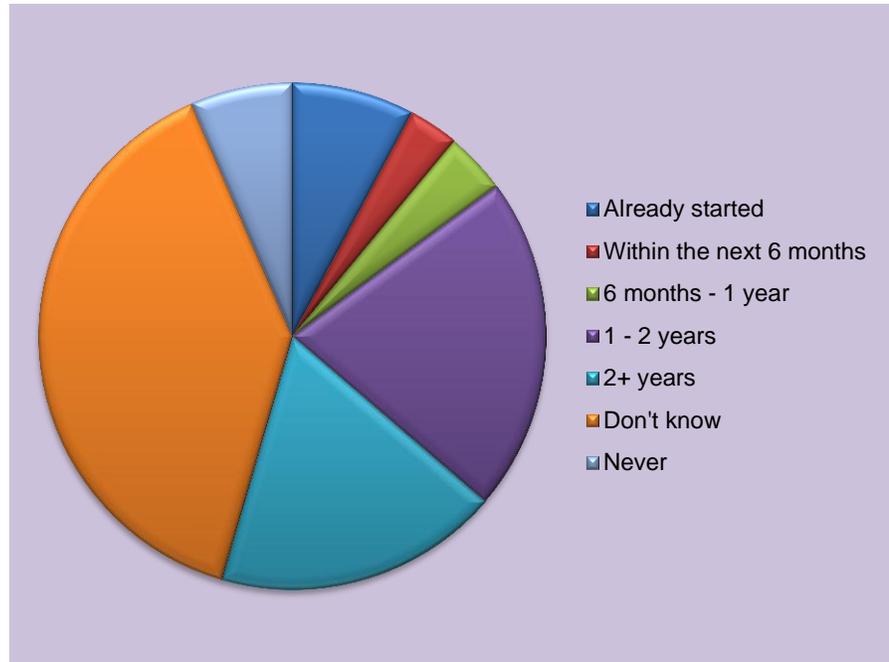
As you can see from Figure 4, there are numerous perceived barriers to implementing Mobile Learning within an organisation, and if the benefits can outweigh the identified barriers then a solution can be reached. This was therefore a crucial question to truly understand the perception of Mobile Learning and why organisations may not feel that this is the right time to implement a solution. Respondents were able to provide multiple answers although the results did not identify any one barrier of outstanding importance or which was considered a major issue.



- 72.1% stated hardware restrictions relating to content use and the end user experience, with a number of organisations saying that the devices currently used throughout the organisation are not fit for the purpose
- 72.1% also said budget
- 64.3% gave resources as a perceived barrier
- 62.3% stated technology

Figure 5: When do you consider your organisation will be in a position to implement Mobile Learning?

- 7.8% have already started
- 7.1% could implement in the next year
- 21.4% said implementation was planned in 1-2 years
- 18.2% could implement in 2 years or more
- 39% didn't know
- 6.5% stated their organisation would never be in a position to implement Mobile Learning



There is still a large amount of uncertainty around Mobile Learning and what benefits it can offer, as confirmed by 39% of our respondents who stated that they were unaware as to when their organisation could implement Mobile Learning technology. It is hugely dependent on the organisation, in terms of their culture and technological development, as well as their management knowledge and expertise. Many organisations are still in need of more information in order to make a decision on when, or indeed if, they will implement a Mobile Learning solution.

The Route to Mobile Learning

We asked further questions of those respondents that had already begun to implement Mobile Learning, to establish what choices had been made in terms of software provider and mobile deployment device.

Figure 6: Chosen Devices for Deployment

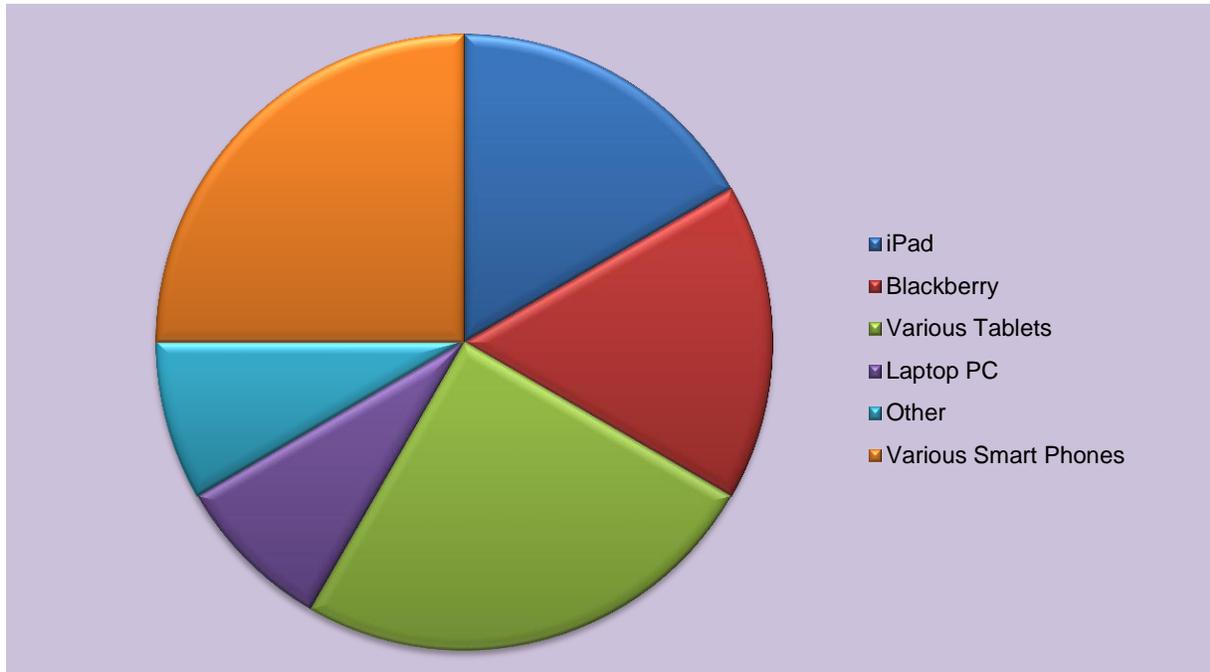
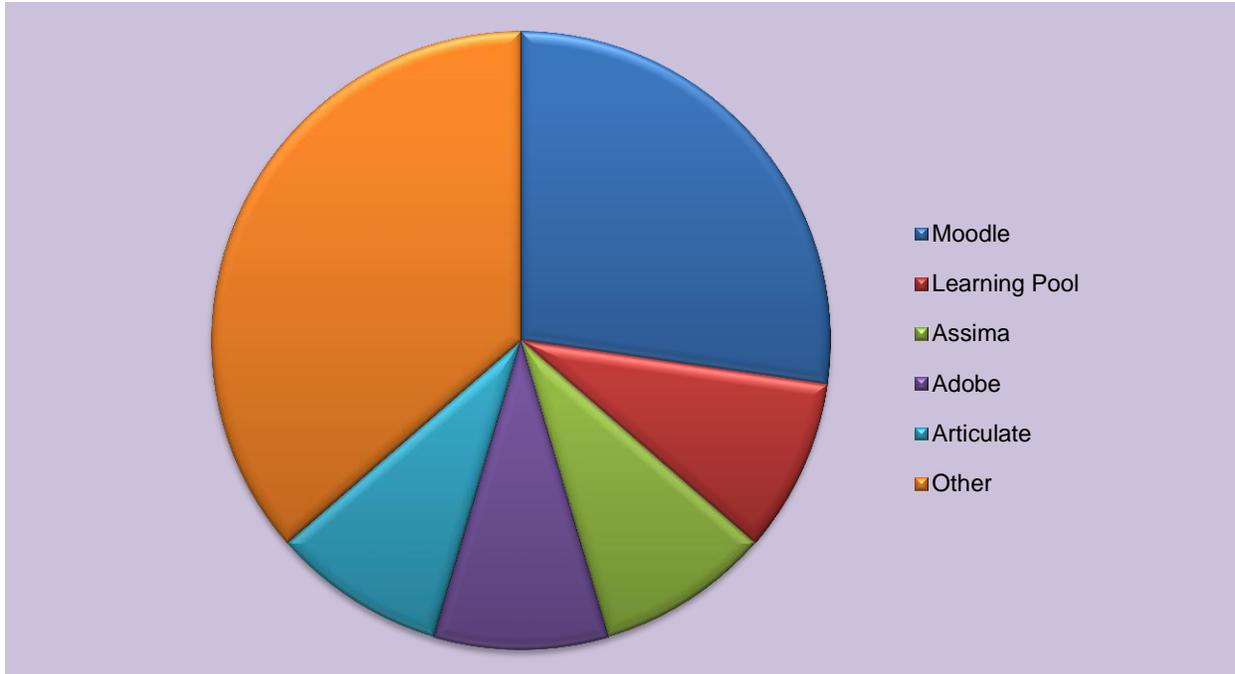


Figure 7: Chosen Software Providers



From the respondents that have already implemented Mobile Learning, most stated this initiative had been considered successful in their organisation, stating that take up was positive and it had been well received. Those that were not able to comment in terms of results were still in the development stage or had not yet evaluated the implementation.

Respondents that had reported rolling out some Mobile Learning content stated that this was either compliance-driven content, such as health and safety or fire training, or soft skills content around management or leadership training. There were some instances of business processes content that were very specific to a business or public sector organisation which had been delivered through Mobile Learning.

We also asked those respondents already involved in a Mobile Learning implementation if the solution provided the ability to track and report by user, including working offline. 40% of respondents reported that their solution did provide this functionality.

The contents of this report are copyrighted by Larmer Brown Consulting Ltd and may not be reproduced, distributed or transmitted in any form without prior written consent by Larmer Brown.

This report is based upon primary research undertaken by Larmer Brown however may include predictions, estimates or other information that might be considered forward-looking. While these forward-looking statements represent our current judgment on the future, they are subject to risks and uncertainties that could cause actual results to differ materially. You are cautioned not to place undue reliance on these forward-looking statements, which reflect our opinions only as at the date of this report.